4 CHAPTER: VIEW TAX ACCOUNT INFORMATION

You can access IRMS to view select taxpayer information about businesses in your locality or up to 20 adjacent localities, and individuals regardless of their locality. A member of a local Commissioner of the Revenue's office can access Sales Tax and Use Tax information for businesses regardless of their locality. Your Memorandum of Understanding (MOU) determines the types of information you can see about taxpayers and their Tax Accounts.

You can view Tax Account information in the IRMS Web application at a summary level and at a detail level. If a taxpayer has multiple accounts, you can view a list of them on the Tax Account List window. You can also view the details of each Tax Account on the Tax Account window.

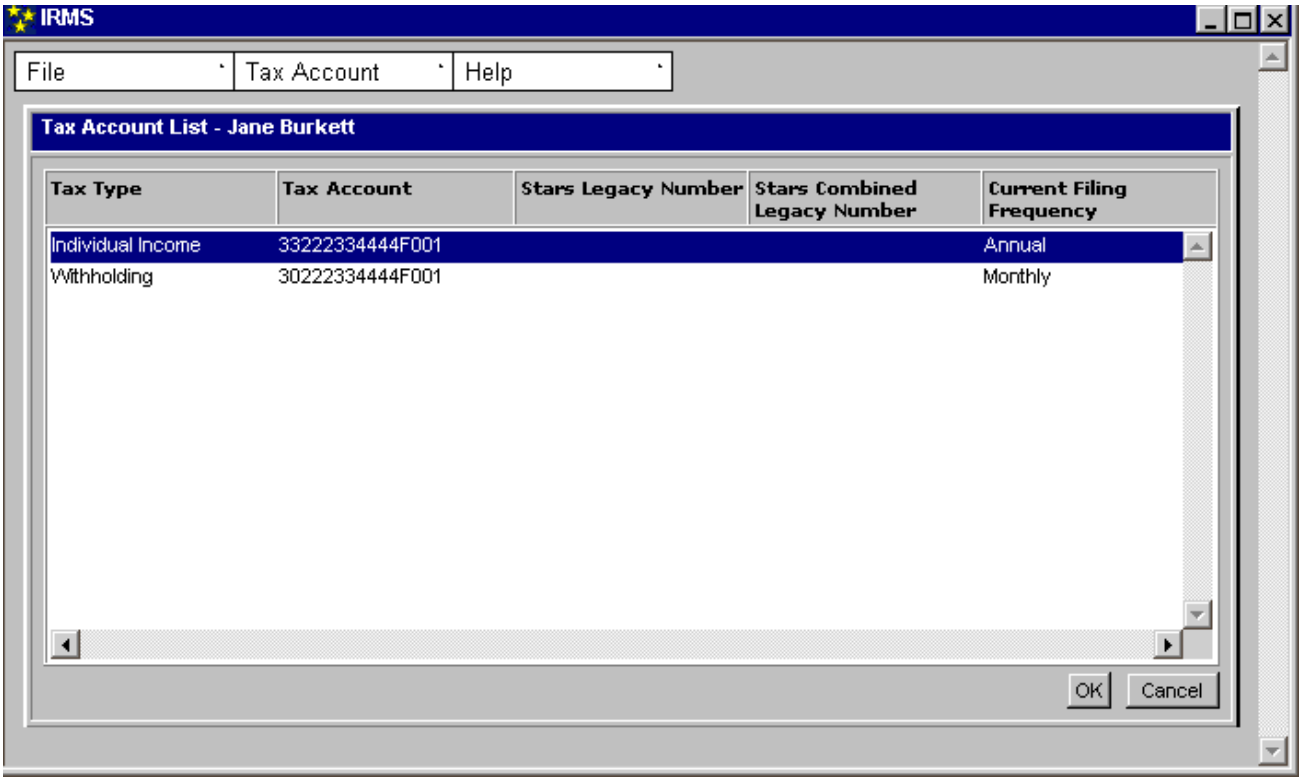
Note: The windows containing customer information are display only. The information cannot be modified.

4.1 View a Tax Account for an Individual Taxpayer

Taxpayers can have multiple Tax Accounts in IRMS. You can view a list of these accounts on the Tax Account List window. The details of each account are located on the Tax Account window.

Tax Account List Window

The illustration below is the Tax Account List window. This window displays only when the taxpayer has multiple Tax Accounts.



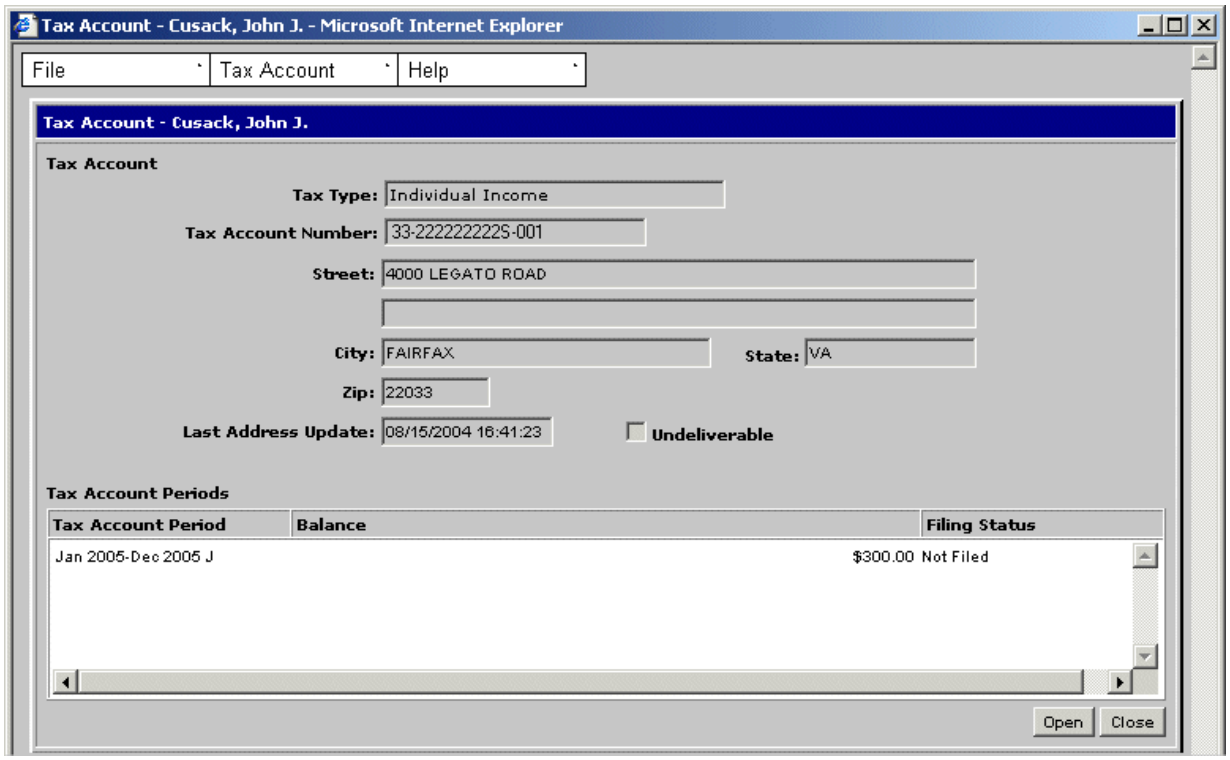
Tax Account List Window Fields

The table below lists the fields in the Tax Account List window and provides a brief description of each.

Field	Field Type	Description
Tax Type	System Generated	The type of tax account (i.e., Individual Income).
Tax Account	System Generated	The unique number assigned to the customer's Tax Account in IRMS.
Stars Legacy Number	System Generated	The Tax Account number in STARS, if applicable.
Stars Combined Legacy Number	System Generated	A number in the former STARS system for certain Sales Tax Accounts, if applicable.
Current Filing Frequency	System Generated	The frequency with which a taxpayer files a return.

Individual Tax Account Window

The illustration below is the Tax Account window for an individual taxpayer.



Individual Tax Account Window Fields

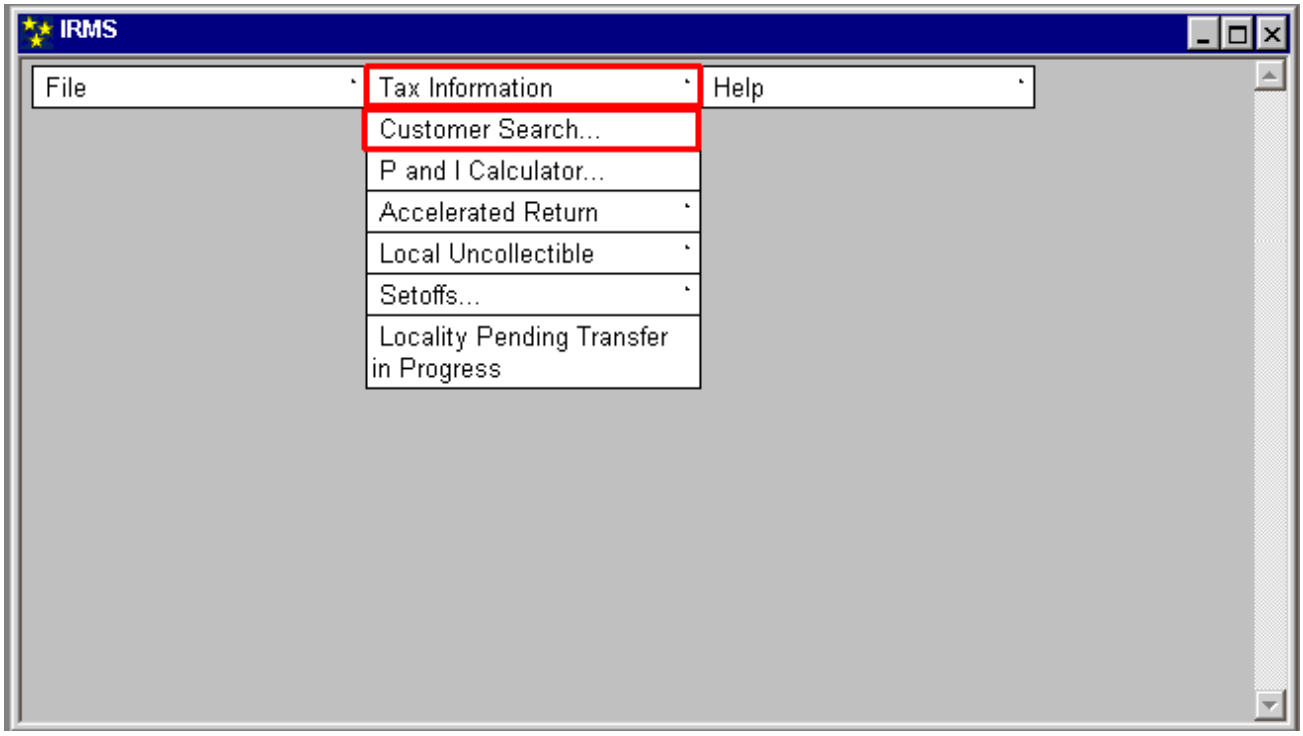
The table below lists the fields on the Tax Account window for an individual taxpayer and provides a brief description of each.

Field	Field Type	Description
Tax Type	System Generated	The type of Tax Account (i.e., Individual Income).
Tax Account Number	System Generated	The unique number assigned to the customer's Tax Account in IRMS.
Street	System Generated	The street address on which the customer resides.
City	System Generated	The city in which the customer resides.
State	System Generated	The state in which the customer resides.
Zip	System Generated	The zip code in which the customer resides.
Last Address Update	System Generated	The last date on which the address saved in IRMS for the customer was updated.
Undeliverable	System Generated	When checked, indicates past attempts to deliver mail to this address have failed and no newer address is available.
Tax Account Period	System Generated	The time frame for which this tax return is computed.

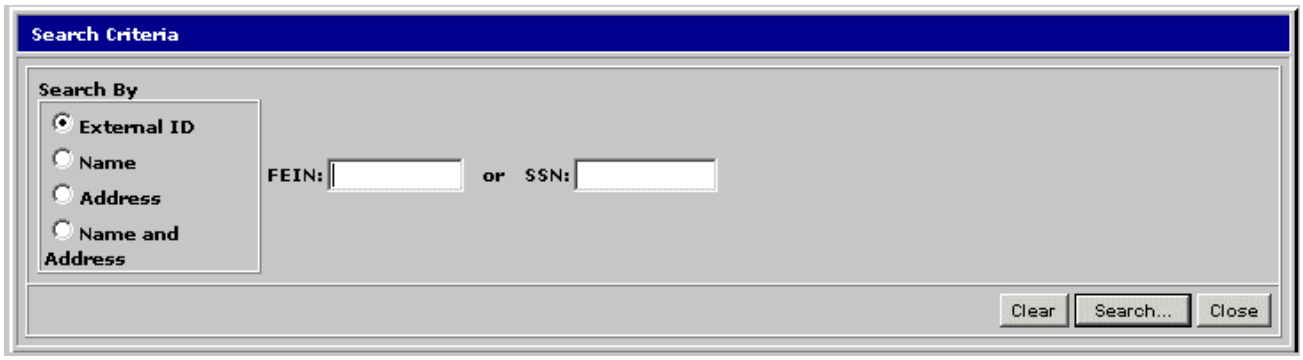
Field	Field Type	Description
Balance	System Generated	The amount of tax owed/refunded for the Tax Account Period.
Filing Status	System Generated	Indicates whether the taxpayer has or has not filed a return.

View a Tax Account for an Individual Taxpayer

To view a Tax Account for an Individual taxpayer, the following steps are performed:



Step 1: From the IRMS Main window, select **Tax Information: Customer Search**. The Search Criteria window opens.

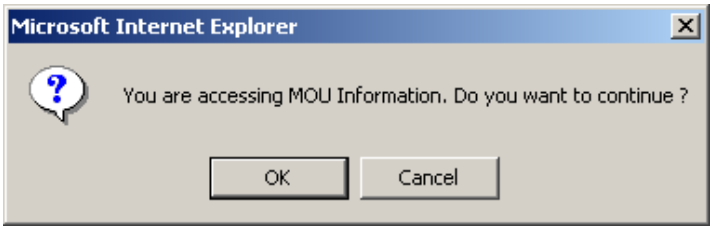


Step 2: Select the appropriate search option in the **Search By** area (see the *View Customer Profile Information* chapter of this User Guide for detailed information on performing a Customer Search).

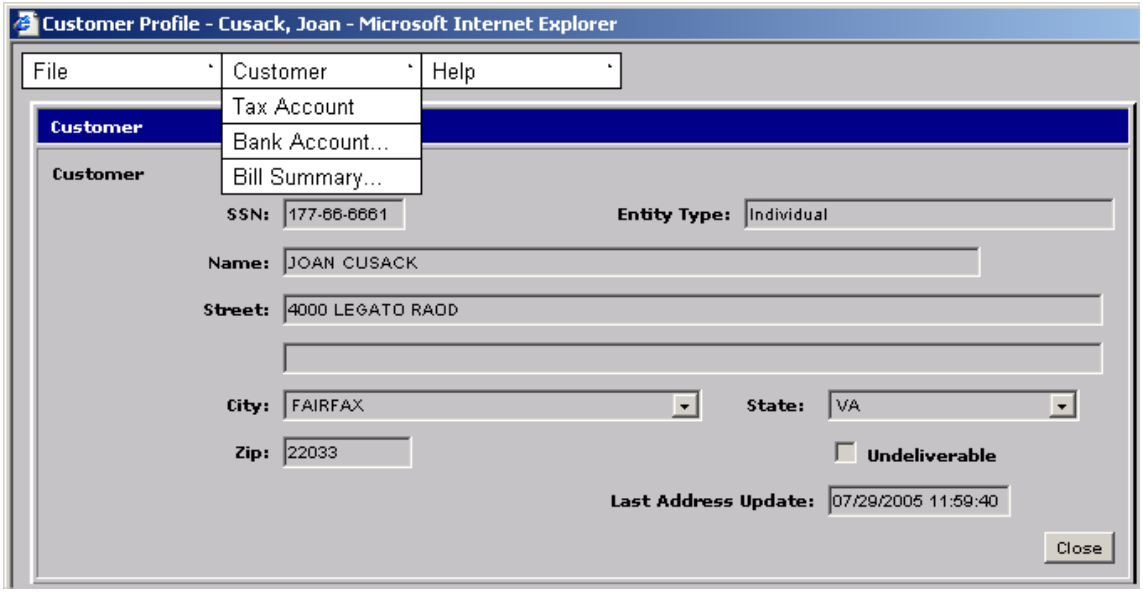
Step 3: Enter the search information in the appropriate field(s).

Note: If you make a mistake, click the **Clear** button to re-enter the correct information.

Step 4: Click **Search**.
A pop-up message window displays telling you that you are accessing MOU information and asking you if you want to continue.

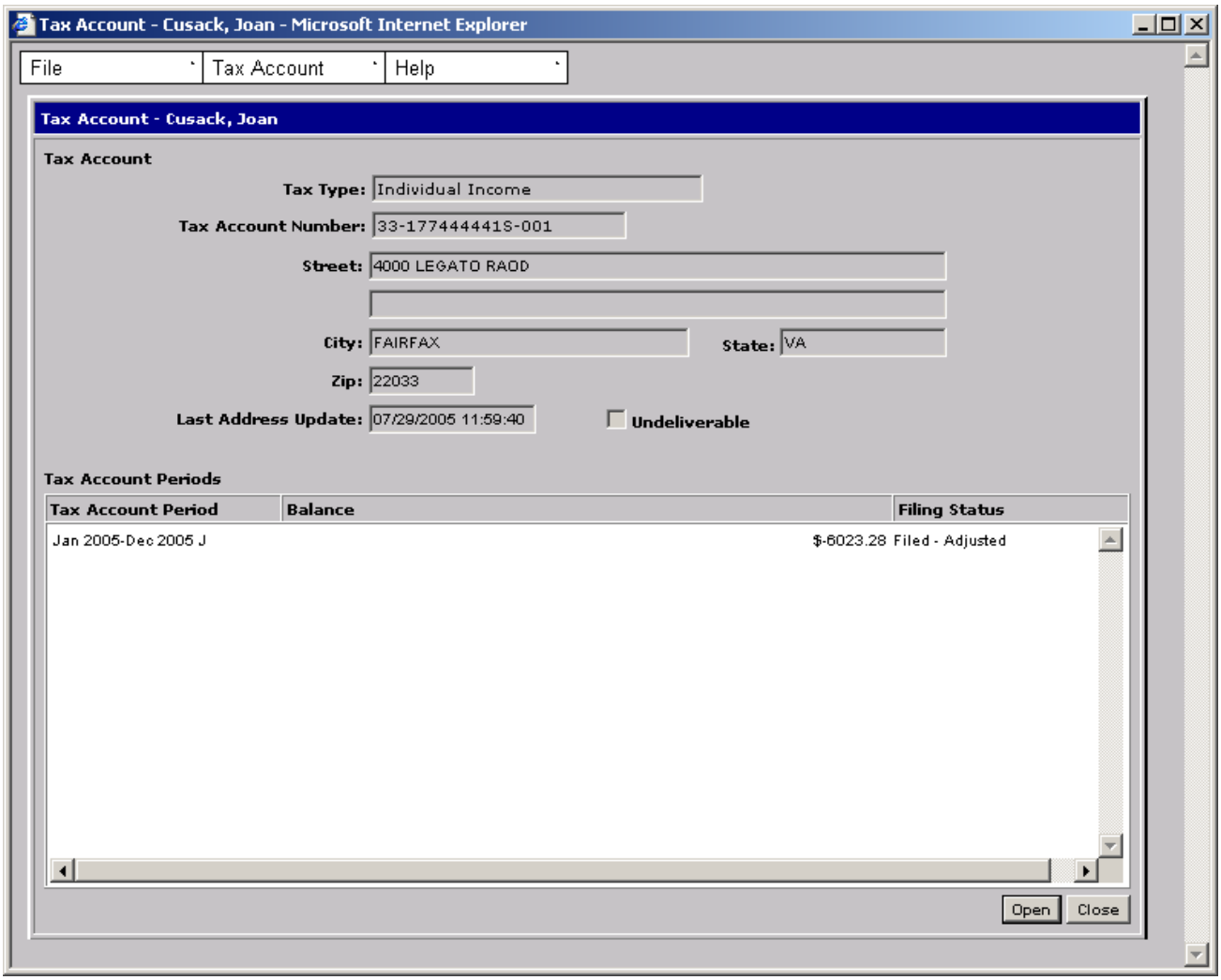


Step 5: Click **OK**.
The Customer Profile window opens.



Step 6: Select **Customer: Tax Account**.
The Tax Account window opens.

Note: If more than one Tax Account exists for this customer, the Tax Account List window opens. To open the Tax Account window, double-click the Tax Account you want to open.



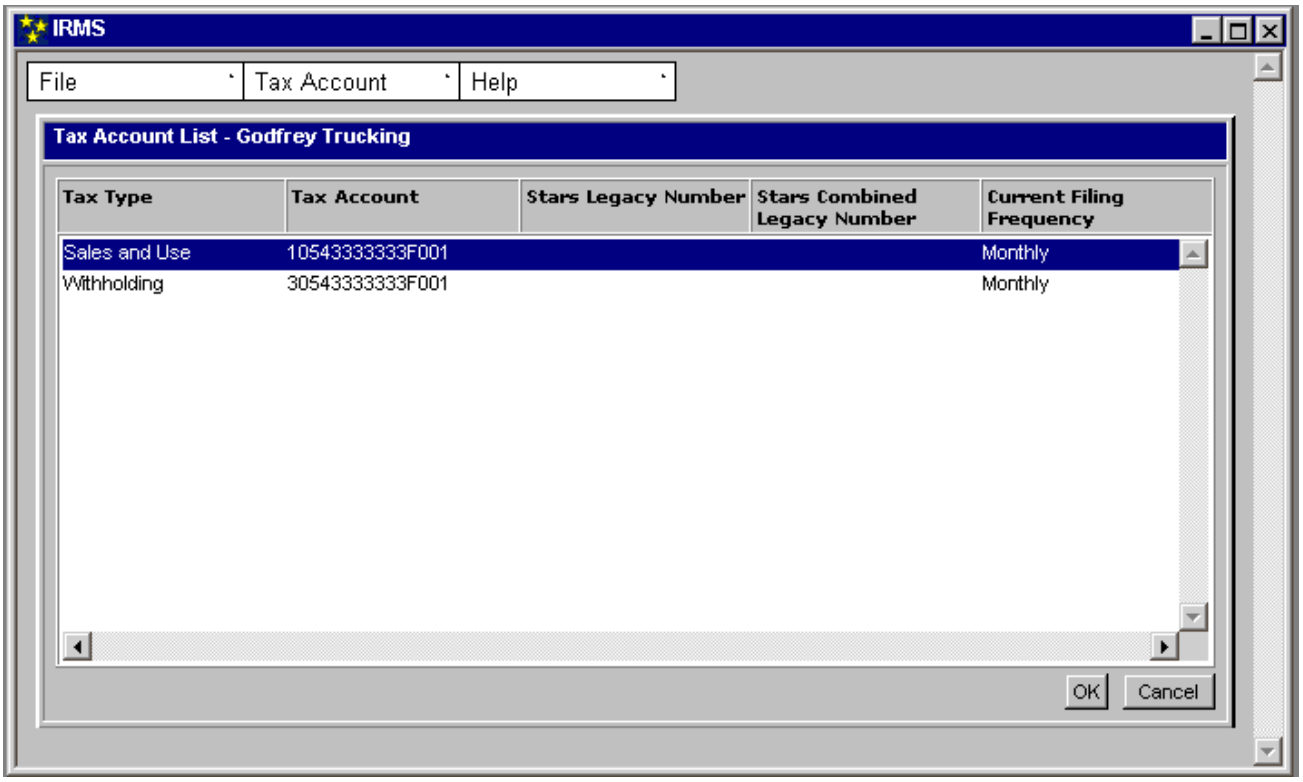
Step 7: From the **File** menu, select **Close** to exit this window.

4.2 View a Tax Account for a Business Taxpayer

A Tax Account is an account that contains the financial data associated with the tax type that it represents.

Tax Account List Window

The illustration below is the Tax Account List window.



Tax Account List Window Fields

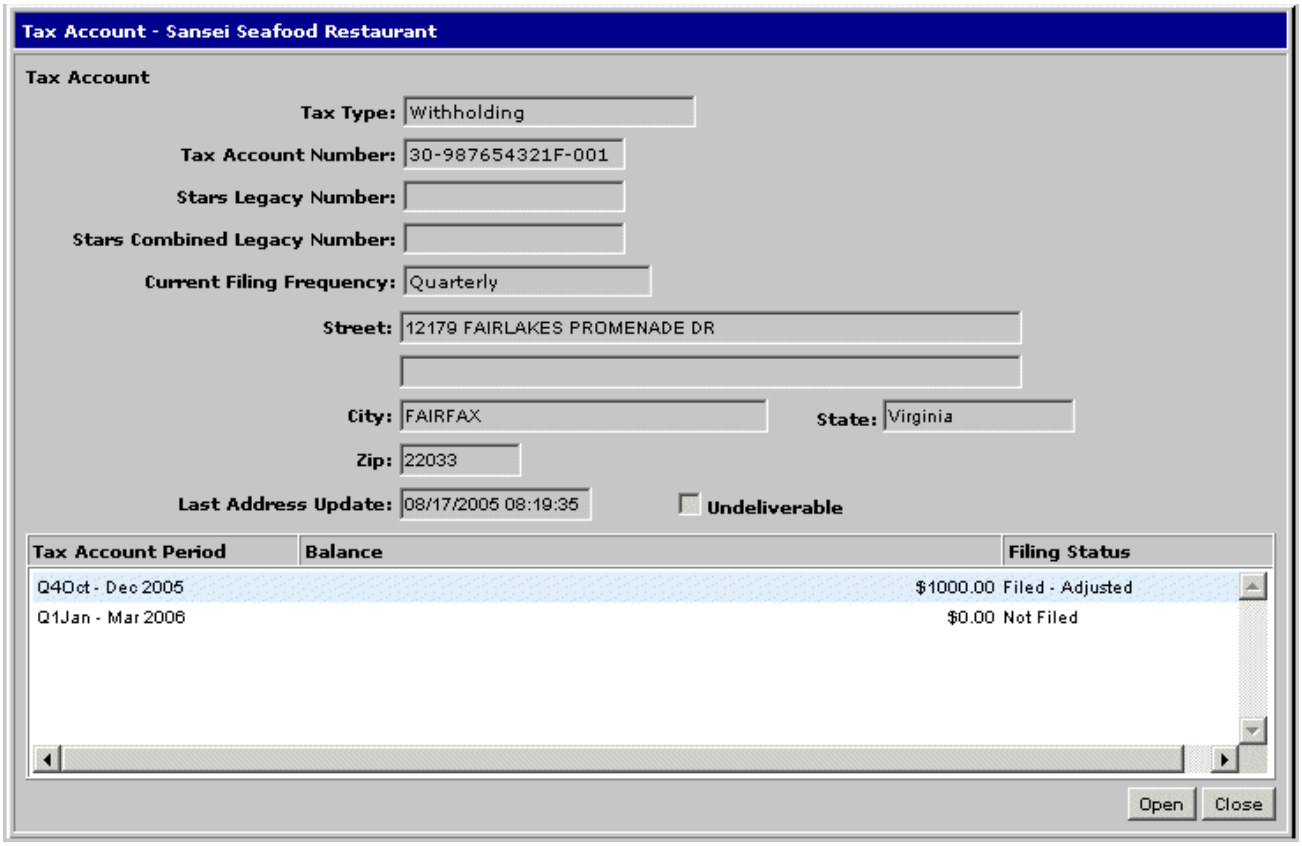
The table below lists the fields in the Tax Account List window and provides a brief description of each.

Field	Field Type	Description
Tax Type	System Generated	The type of Tax Account (i.e., Sales and Use, Withholding, Corporate, etc.).
Tax Account	System Generated	The unique number assigned to the customer's Tax Account in IRMS.
Stars Legacy Number	System Generated	The Tax Account number in STARS, if applicable.

Field	Field Type	Description
Stars Combined Legacy Number	System Generated	A number in the former STARS system for certain Sales Tax Accounts, if applicable.
Current Filing Frequency	System Generated	The frequency with which a taxpayer files a return.

Business Tax Account Window

The illustration below is the Tax Account window for a Sales and Use Tax Account.



Business Tax Account Window Fields

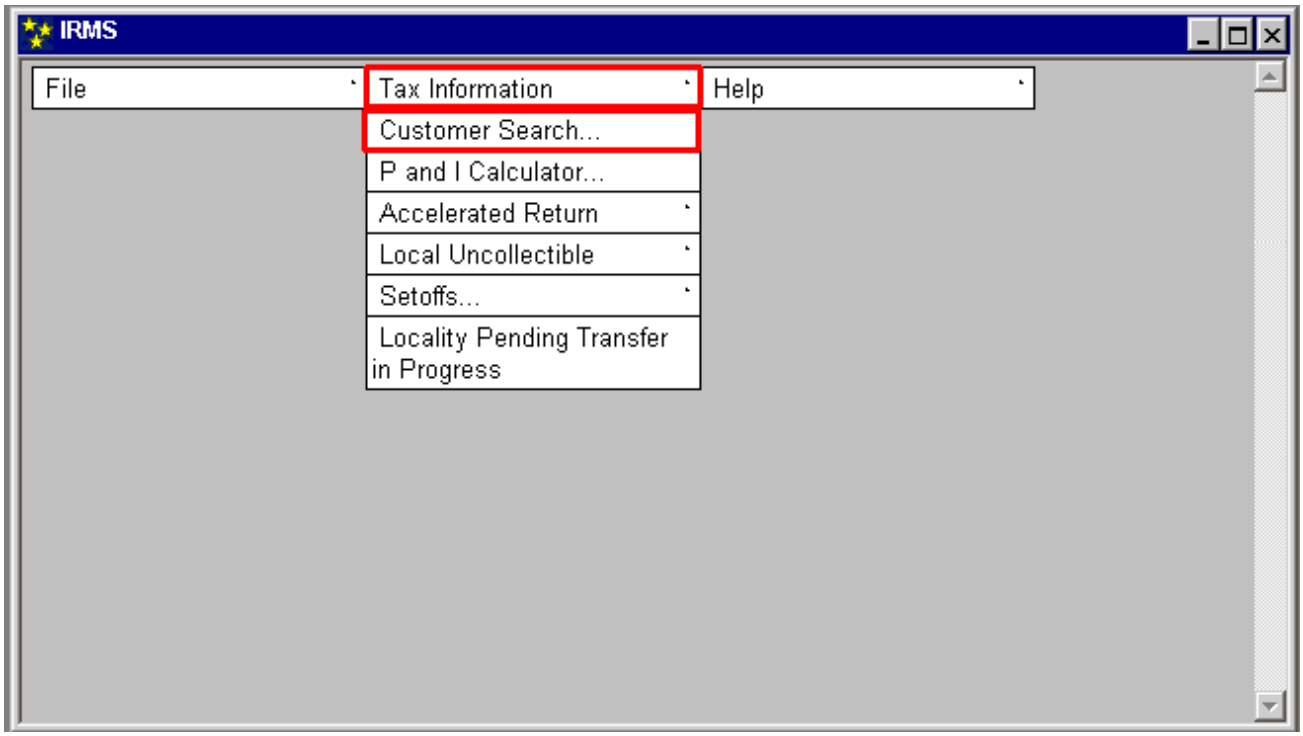
The table below lists the fields on the Business Tax Account window and provides a brief description of each.

Field	Field Type	Description
Tax Type	System Generated	The type of Tax Account (i.e., Sales & Use, Withholding, Corporate, etc.).
Tax Account Number	System Generated	The unique number assigned to the customer's Tax Account in IRMS.

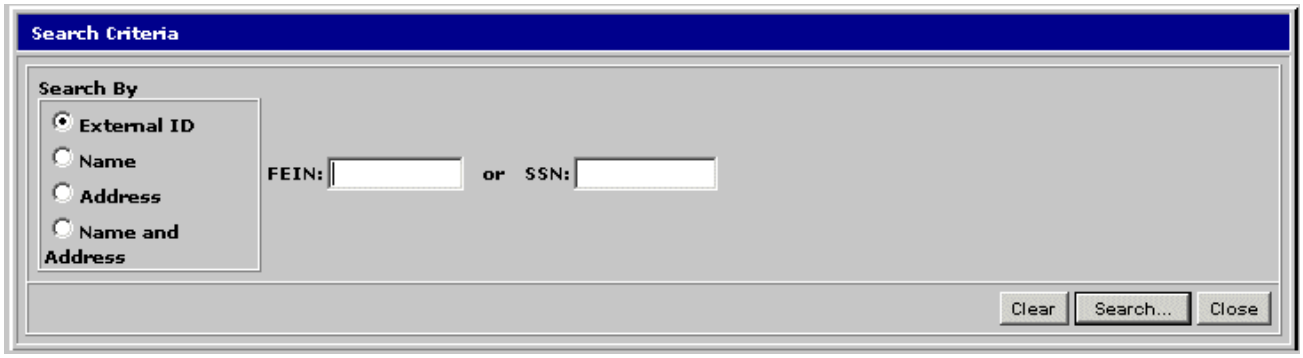
Field	Field Type	Description
Stars Legacy Number	System Generated	The Tax Account number in STARS, if applicable.
Stars Combined Legacy Number	System Generated	A number in the former STARS system for certain Sales Tax Accounts, if applicable.
Current Filing Frequency	System Generated	The frequency with which a taxpayer files a return.
Street	System Generated	The street address on which the customer resides.
City	System Generated	The city in which the customer resides.
State	System Generated	The state in which the customer resides.
Zip	System Generated	The zip code in which the customer resides.
Last Address Update	System Generated	The last date on which the address saved in IRMS for the customer was updated.
Undeliverable	System Generated	When checked, indicates past attempts to deliver mail to this address have failed and no newer address is available.
Tax Account Period	System Generated	The time frame for which this tax return is computed.
Balance	System Generated	The amount of tax owed/refunded for the Tax Account Period.
Filing Status	System Generated	Indicates whether the taxpayer has or has not filed a return.

View a Tax Account for a Business Taxpayer

To view a Tax Account for a business taxpayer, the following steps are performed:



Step 1: From the IRMS Main window, select **Tax Information: Customer Search**.
The Search Criteria window opens.

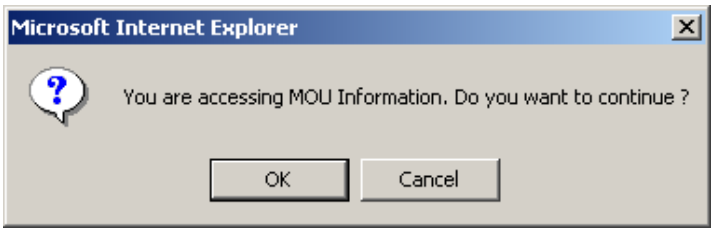


Step 2: Select the appropriate search option in the **Search By** area (see the *View Customer Profile Information* chapter of this User Guide for detailed information on performing a Customer Search).

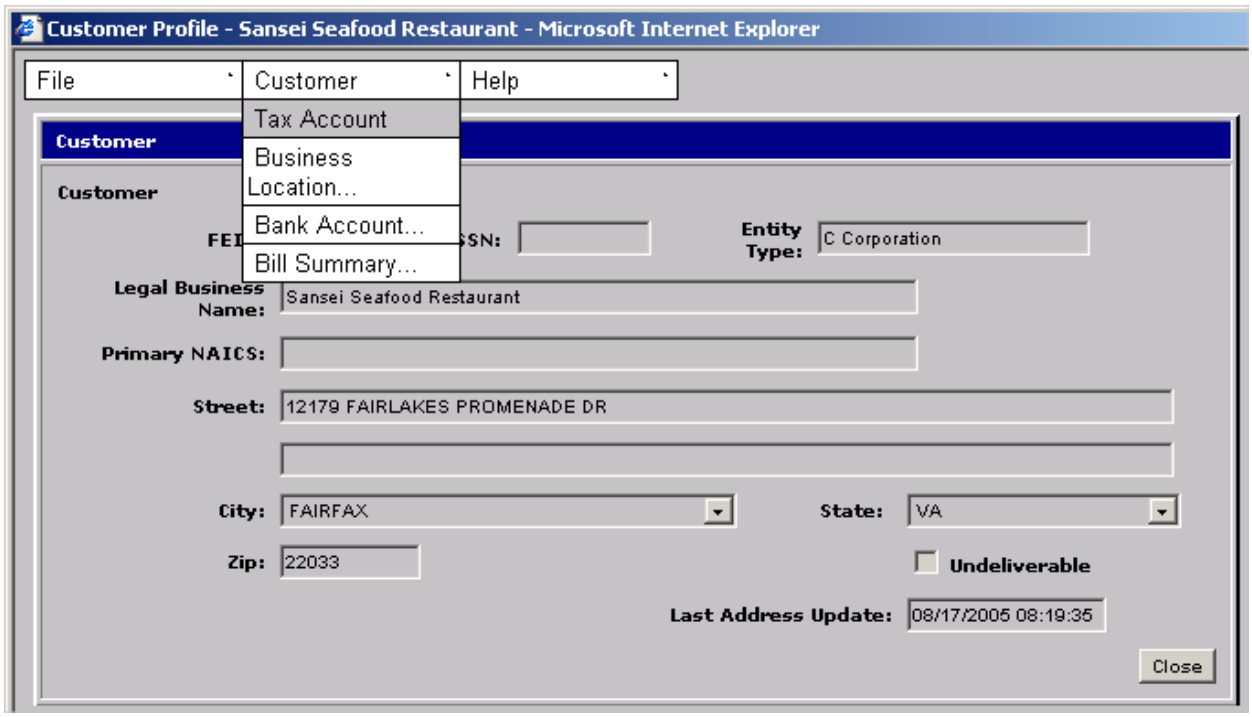
Step 3: Enter the search information in the appropriate field(s).

Note: If you make a mistake, click the **Clear** button to re-enter the correct information.

Step 4: Click **Search**.
A pop-up message window displays telling you that you are accessing MOU information and asking you if you want to continue.

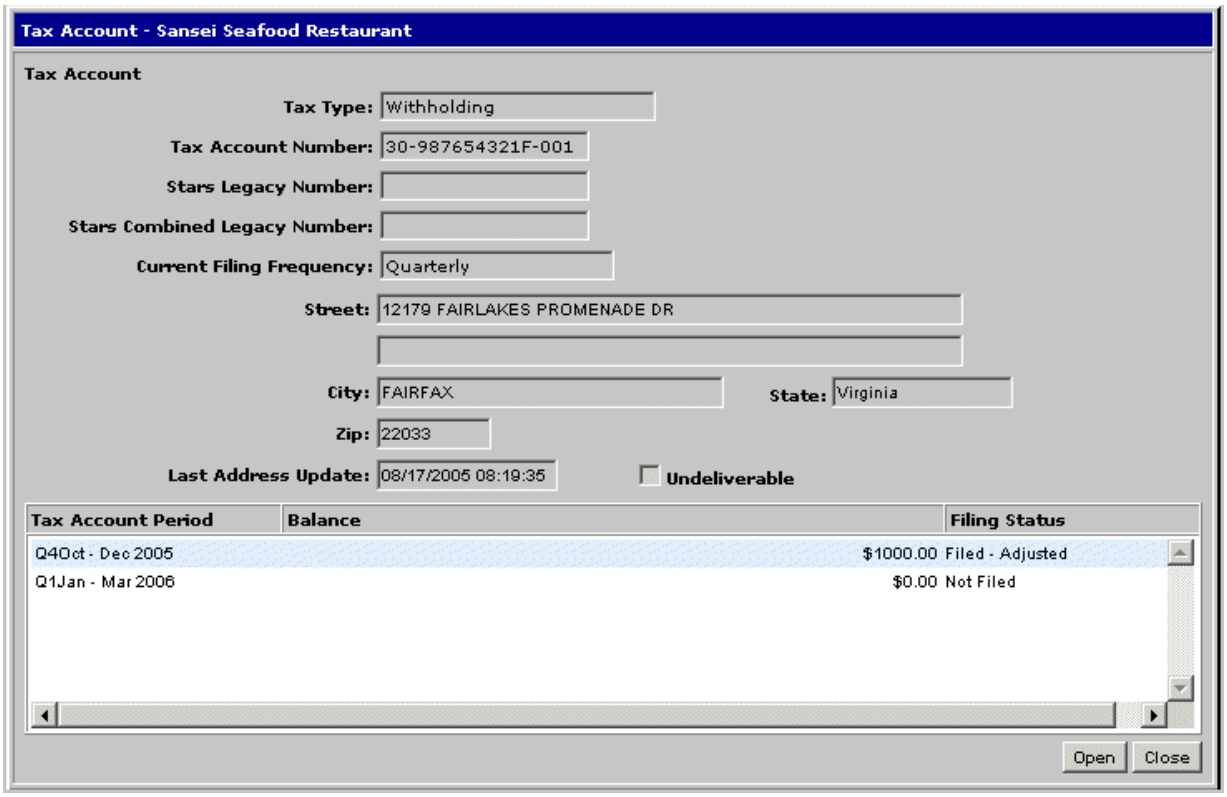


Step 5: Click **OK**.
The Customer Profile window opens.



Step 6: Select **Customer: Tax Account**.
The Tax Account window opens.

Note: If more than one Tax Account exists for this customer, the Tax Account List window opens. To open the Tax Account window, double-click the Tax Account you want to open.



Step 7: From the **File** menu, select **Close** to exit this window.